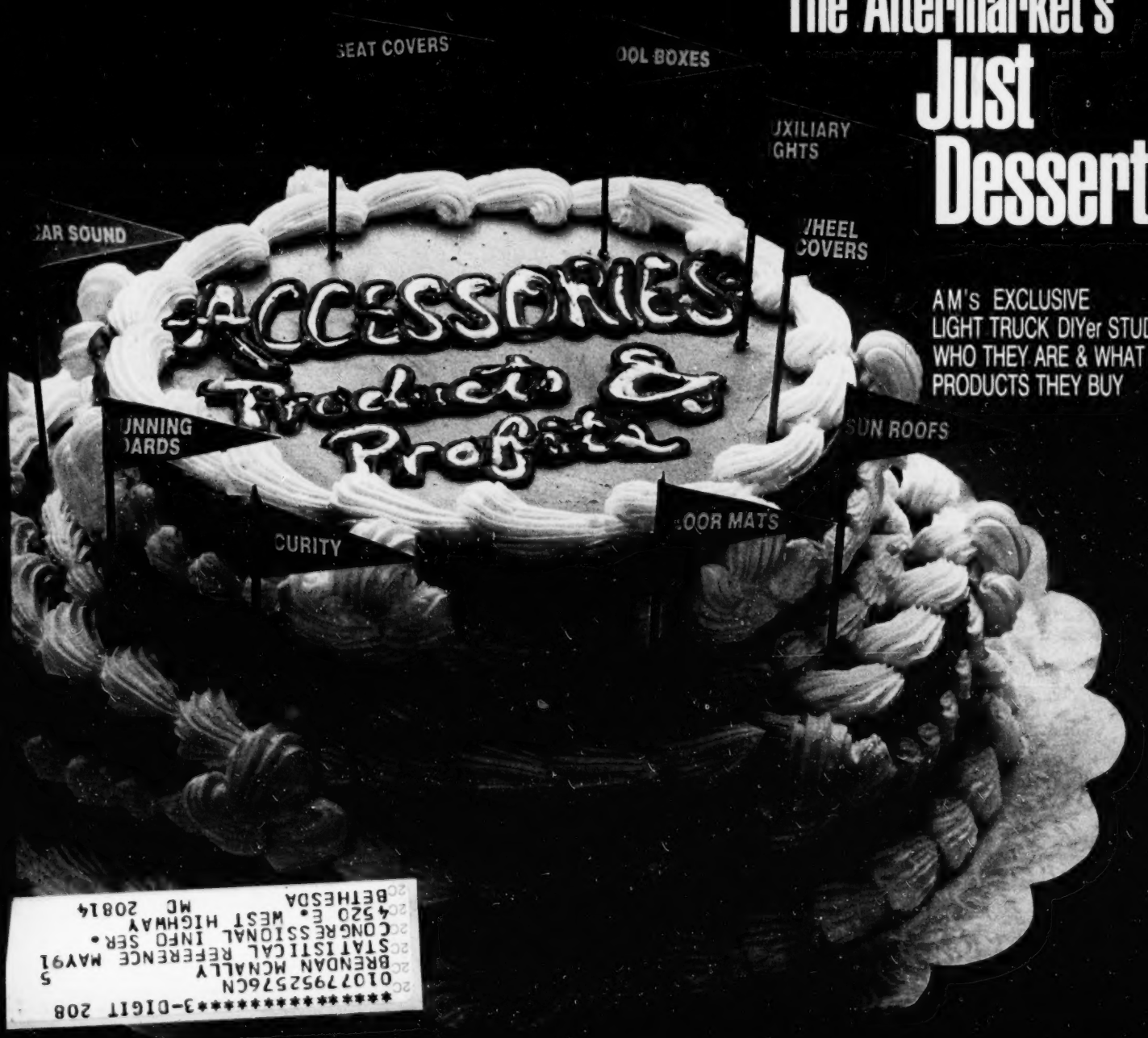
Your Information Source For The Automotive Aftermarket

JUNE 1990

The Aftermarket's Just Desserts



A M's EXCLUSIVE
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WHO THEY ARE & WHAT
PRODUCTS THEY BUY

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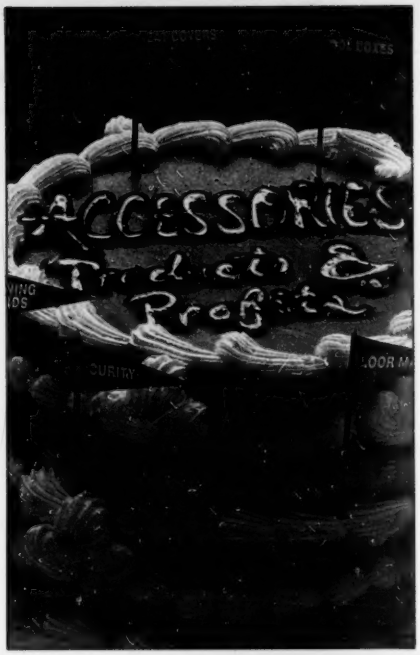

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The Aftermarket's Just Deserts 25
Accessories are "feel good" products. Like rich deserts, consumers buy them simply because they want them, not because they need them.

The Light Truck DIYer: A Breed Apart 30
Male baby-boomers like their light trucks, vans, and utility vehicles. And, they buy lots of products to personalize them.

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MARKET LINE

Big "I" & Sema/AI Shows To Run Concurrently At "Industry Week" In Las Vegas In 1992

Starting in November 1992, the Big "I" show and the SEMA/AI show will be held simultaneously in Las Vegas.

The Big "I" is sponsored by the Automotive Service Industry Association (ASIA) and the Motor Equipment Manufacturers Association (MEMA), while the SEMA/AI show is sponsored by the Specialty Equipment Market Association (SEMA) and Automotive Internacional Association (AIA).

In addition to linking the Big "I" and SEMA Shows, the associations announced that starting in April 1992, the SEMA East and Big "E" Shows would be held side-by-side each year. The first will be held April 7-9 in Atlanta. In February 1993, the joint eastern shows will move to Chicago, and set up in Atlantic City, NJ, in April 1994.

1992-1995 INDUSTRY SHOW SCHEDULE

The announcement of side-by-side shows by Big 'I' and SEMA makes the show schedule for 1992-1995 look like this:

Date	Show	Location
April 7-9, 1992	ASIA/MEMA/ SEMA-AI	Atlanta
Oct. 1-4, 1992	APAA	Chicago
Nov. 18-20, 1992	MEMA/ASIA SEMA-AI	Las Vegas
Feb. 23-25, 1993	ASIA/MEMA SEMA-AI	Chicago
Oct. 18-21, 1993	APAA	Chicago
Nov. 17-19, 1993	MEMA/ASIA SEMA-AI	Las Vegas
April 19-21, 1994	ASIS/SEMA-AI MEMA	Atlantic City
Oct. 17-20, 1994	APAA	Chicago
Nov. 16-18, 1994	SEMA-AI/ASIA MEMA	Las Vegas

Changes Outlined

The changes were announced at a press conference in Las Vegas on May 10. Speaking were John Riess, chairman of the Big "I" Show Joint Operating Committee and group vice president/marketing for the Gates Rubber Co., Denver; ASIA chairman Gene Gardner, director of planning, quality and productivity for E.I. duPont deNemours & Co., Wilmington, DE; and SEMA chairman Michael Warn, CEO of Warn Industries, Milwaukie, OR.

"Our three organizations have agreed to designate the week of November 16, 1992 'Automotive Aftermarket Industry Week'," Riess said. "Aftermarket Industry Week, sponsored by our three associations, will provide the umbrella for the largest annual exhibit of aftermarket products ever held in the United States."

Riess projected 2,000 exhibitors and 25,000 buyers shopping the Shows with total attendance close to 60,000. Plans call for the SEMA/AI Show to remain at the Las Vegas Convention Center and the Big "I" Show to occupy the new Sands Expo and Convention Center.

Riess stressed that the two shows would be "entirely separate shows. But there will be only one registration and badge needed for both shows. And we will run all day transportation between the two shows."

Show policies will be established and managed by a Automotive Aftermarket Industry Week Joint Operating Committee to be set up by ASIA, MEMA, and

APAA Replies

Autmotive Parts and Accessories Association (APAA) president Julian C. Morris said that all parties involved in the decision announced in Las Vegas had taken an important step. "Exhibitors and buyers throughout the industry are likely to make strategic marketing decisions based on contemporary business conditions that are going to require some reassessment and certainly the utmost flexibility," he said.

However, Morris added that the APAA board had not yet met to discuss the side-by-side shows. ■

The Wax Market: Clear Coats, Competitors & Growth

According to Chuck Tornabene, senior vice president/general manager for consumer products, Turtle Wax, Chicago, the long-time leading wax supplier, "The biggest change in the wax market is that the category has changed from a competition standpoint. But Turtle Wax still remains dominant."

The major change in competition Tornabene refers to is the entrance of Armor All, Irvine, CA, with its own wax products in 1988. And, in 1989, Armor All bought Borden (including Rain Dance). Today, Turtle Wax and Armor All dominate the market.

Armor All's marketing manager Rick Manoogian believes, "The wax market is going through a real consolidation, down to a few key players. Although there will always be specialty marketers, there will only be three or four major players in the business."

Tornabene agrees with this assessment. "Without naming any names," he told us, "what you're going to see happen, is smaller manufacturers' brands will fall by the wayside in the next few years. The field is going to narrow down."

Armor All Changes The Game

Armor All capitalized on its success in the protectant category in selling its waxes. The company spent about $5 million in advertising the first year, and as Manoogian noted, "We've seen a category growth factor. Our tracking studies show it's due to spending on advertising. And, because we spent, others did too."

According to A.C. Nielson, New York, the wax market was up 6% in 1988 and up 9% in 1989. Estimates from the suppliers we spoke with put the market in the $180-$200 million range at retail.

Tornabene agreed that Armor All's entry has been positive for the market. "Advertising has increased substantially. We've supported the category for years, and the competition has spent a lot of money recently. The effect has been positive; there's been some growth in the category. The market had been fairly flat for some time; now there's some increase in unit sales. There's an opportunity to grow the market," he said.

Tornabene believes about 45% of car owners wax their cars regularly. Although several other suppliers put the percentage a bit higher, there's a general consensus that no more than half of vehicle owners are regular waxers. Even in *Automotive Marketing*'s latest *Consumer Automotive Repair Study (CARS)*, which is confined to DIYers, just 62% of DIYers purchased and applied wax.

Clear Coats As Market Factors

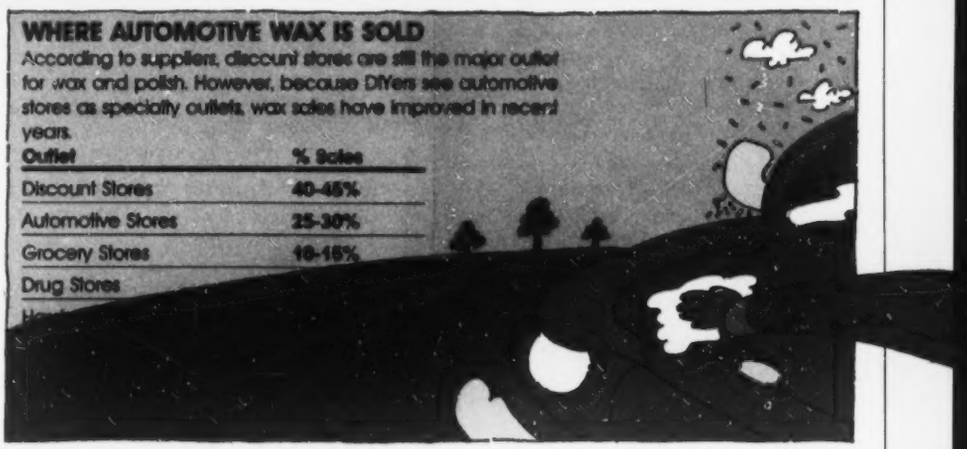
DIYers who wax their cars regularly tend to be brand loyal. So, in spite of a steady parade of new products and new names in the category, Turtle Wax Hard Shell and Rain Dance (under three separate owners) have remained the number one and two best sellers since the early 1980s. While this might seem discouraging to the smaller brands, there are new market influences that might shift loyalties.

One is the extensive use of clear coat paints by OE carmakers. J.D. Culea, president, Kit Products division of Northern Labs, Manitowoc, WI, said suppliers are in the interesting position of spending money to tell customers not to use the wax they've been using for years and years; that the traditional wax will not work on their new car; that the traditional wax will actually ruin the paint on the new car. Culea calls this, "anti-category advertising. It's a whole new area of concern for the DIYer and the supplier. If they pick the wrong wax, they can ruin their new car."

WHERE AUTOMOTIVE WAX IS SOLD

According to suppliers, discount stores are still the major outlet for wax and polish. However, because DIYers see automotive stores as specialty outlets, wax sales have improved in recent years.

Outlet	% Sales
Discount Stores	40-45%
Automotive Stores	25-30%
Grocery Stores	10-15%
Drug Stores	



Mel Miller, director of marketing at Meguiar's, Irvine, CA, agrees. "There's a rapidly changing technology in car wax and polish because of things like clear coats and pollution such as acid rain. These require consumer knowledge of maintenance finishes." Meguiar's, long known for non-abrasive wax technoogy, provides a car care finish guide that allows consumers to match their car's finish to a three or four step maintenance guide.

Miller said clear coats were nothing new to Meguiar's: "We sell our heritage. Our heritage is in professional trade work with OEs. Working with car makers allows us to develop new products as rapidly as new finishes are devised."

But while wax suppliers improve their technologies, Culea pointed out, clear coats are being sold as permanently polished by OE dealers. "New car dealers are increasing their awareness of clear coats as a selling point. Some dealers are telling their customers that there's no waxing ever needed on clear coats."

So between DIYers afraid of waxing their car, and DIYers being told they don't have to wax their car, Culea said, there might easily be a negative affect on the market.

Product Efficiency

At the same time suppliers must ensure that DIYers use the correct wax, they are also struggling to provide an effective wax. Mike Moshontz, president of Blue Coral, Cleveland, noted. "For every benefit, you have to give up something. Traditionally, products with no abrasives have been weak in the brilliance of the shine. Some smear. Some are hard to apply. The durability is not as good. You have problems providing products that fulfill the promise, products that do what they say."

All the major wax suppliers have spent time and money to reformulate their products to serve the roughly 30% of vehicles with clear coat finishes. However, the 70% of cars with traditional paint may be left behind. There is the potential for the proud owner of an older car to choose a reformulated wax and not get the result he's used to.

"A non-abrasive wax just doesn't clean as well," Julia Hobbie-Low, product manager Simoniz, First Brands Corp., Danbury, CT, said. "It doesn't do the full job." And so, Simoniz is adding a deep-cleaning car wax to service the larger market. "Clear coats have really segmented the market in a way that we didn't see before. We thought we'd address the larger segment although it's admittedly growing smaller all the time. But we wanted products to address all segments of the market."

The overall effect of new car finishes and new wax formulas on the market will not be clear for several years. But, Moshontz said, "A wax is on trial every time it's used. If it doesn't perform as well as expected, people will try other brands. So it may be easier to change brand loyalties in the future."

Top Two

Although Hard Shell is still its leader, Turtle Wax has always been innovative with new products, and probably has more SKUs than any supplier. "Strategically, we try to cover all the bases," Tornabene said. "Customers differ in attitude, and we want to satisfy all needs.

"There's been a real increase in women waxers lately," Tornabene said while discussing demographics. "They account for a sizable segment, it's maybe 40% in some cases. So in developing our media plan, we're going to have to take women into consideration."

Tornabene also noted that the fall is becoming more important in wax sales. "We strongly encourage retailers to capitalize on this opportunity. We have the programs in place."

Among Turtle's new products for 1990 are a wax specially formulated for brand-new cars, and Turtle Wax Plus, a high-end ($5-$7) wax formulated to last as long as a wax possibly can.

Armor All is not cutting back its aggressive campaign, both for Armor All and newly acquired Rain Dance. "This year we plan to advertise our brands just as heavily as we have for the past two years," Manoogian said. "Remember, we've only been in the business for two years and we feel we're at the category leadership already."

Manoogian feels the shelves are filled with too many SKUs. "There are just too many products fragmenting retailer's shelf space. I think retailers should examine their shelves and see if the brands they carry are the ones really moving the category. Are the brands investing in and supporting the category?"

Armor All offers three brands at three price points. Rain Dance at the top of the line ($6-$7), Armor All in the middle ($4-$5), and Rally for the price conscious shopper ($3-$4). "We feel the brand strategy is the direction we want to go. Our goal is to be the number one supplier with a family of brands. It won't be through proliferating SKUs. We won't force new SKUs on the retailer. It will be through our presence and continuing to grow the SKUs we have."

Behind Turtle Wax and Armor All, several companies jockey for market shares.

Simoniz emphasizes the total appearance chemical business. "There's an opportunity in the *appearance* category," Hobbie-Low said. "We can capitalize on add-on sales. Do the whole thing: washes, waxes, cleaners, protectants at one time. Take care of all your car's needs. There's an advantage we have, we've got all the products."

Hobbie-Low conceded that Simoniz has never reclaimed its success of the 1950s when Simoniz was almost a verb rather than a noun. "It's been footballed around by several companies with no real constant support." But, she said, she thinks stronger support will come through First Brands which already has market leaders in STP and Prestone. "It's one of our objectives."

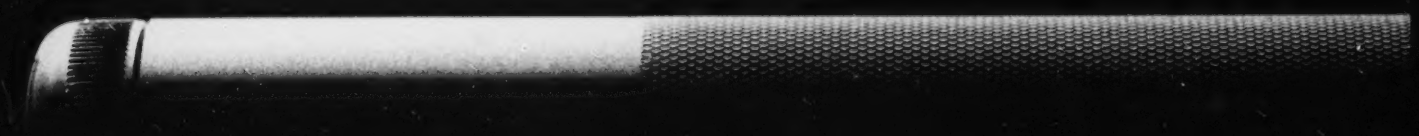
A Big Surprise

The surprise of 1989 was Nu-Finish, a wax manufactured by Reed Union, Chicago. Competitors credit its success to a rave review by *Consumer Reports* in June 1988. The magazine rated both paste and liquid versions of Nu-Finish highest of 30 waxes tested. (For the record, Blue Poly Paste, Mequiar's Paste, and Rain Dance Liquid were rated just a shade behind Nu-Finish).

"People are speaking to us like we're movie stars suddenly," Nu-Finish product manager Steve Hopkins said. "It's not a gimmick. It's just word of mouth. We're in Wal-Mart, we're in K mart, we're already getting bigger. Most competitors think consumers are just not intelligent. Our basic message is we're giving the consumer what he asks for. No rebates, no gimmicks, no promotions. We're a dull company, but we shine in certain areas."

Blue Coral, like Armor All, runs a three brand program. Westley's at the low-end and Blue Coral in the middle.

IT MOVES AT THE



Lately, it seems the number of people buying rugged, reliable Mag-Lite® flashlights for use in their cars has been accelerating like crazy.

For good reason. Mag-Lite® sales are being fueled with a multi-million dollar advertising campaign. And with the demand for quality becoming a major factor among consumers in automotive accessory purchases, there's no sign Mag-Lite® will be slowing down any time soon.

Performance in the retail marketplace is just

But it's on top that Blue Coral stands out. Its top-of-the-line Blue Poly is still one of the better selling waxes at $7-$10. As a result, Moshontz admits that while his unit share is low, his dollar share is much better. "And you can't take units to the bank," Moshontz said. Blue Coral has very strong sales in other appearance products and recently purchased the Krylon paint business from Borden's.

Other Players

Kit Products is introducing a premium wax that, Culea said, "will sell at about $10-$12. It uses a West German formulation that uses the best ingredients that we are aware of. It's geared for the enthusiast who wants the very best."

Culea conceded the small brands have a tough road ahead. But he said, "Considering the situation: a stable market, shrinking shelves, and more competition, in light of all that, I'm very pleased to be where we are. I'm not concerned about the short term."

There is also Mothers Polish, Huntington Beach, CA, a good, solid competitor for the car enthusiast's business. Mothers sells well in performance shops. And, 1989 saw the entrance of Reggie's Wax, Costa Mesa, CA, started by ex-baseball all-star Reggie Jackson. Although it's too early to call the relative positioning of Reggie's Wax, this company is aggressively pursuing the retail segment.

While the wax market has shown better-than-expected growth in recent years, the major suppliers all plan extra efforts in add-on sales this year, particularly in car washes.

Turtle Wax's Tornabene noted that car washes are a $100 million market that is still undeveloped. Armor All's Manoogian believes that only a third of all car washers are using a car wash. Most use household detergents. Car wash products have the advantage of potential weekly use while only a very few people wax their cars more than once a year.

Finally, when all is said and done, Blue Coral's Moshontz gave the simplest explanation of success and failure in the wax market. "As long as people are proud of their car, they'll wax it. But the business is dependent on Mother Nature. If you have a lot of rainy weekends, you'll have a difficult year, if it's sunny most weekends, you'll have a successful year." ■

Clean Air Bill Good For Our Side, So Far

After two years of struggle, Congress is finally close to passing a bill revising the Clean Air Act. Two provisions of the proposed new law could have a major impact on the aftermarket. One is the requirement for on-board diagnostic equipment and the other is the requirement for emissions parts warranties. On both issues, it appears that the aftermarket is getting almost everything it wanted in the final joint bill.

The Senate passed its version of the bill on April 3. At press time, the House Bill had left Committee hearings and was expected to be passed in May with a joint House/Senate Bill to follow. Congressional leaders have targeted June 15 for the presidential signing.

Emissions Diagnostic System

A provision in the Senate Bill (S.1630) requires the OE manufacturers to design and install an on-board emission diagnos-

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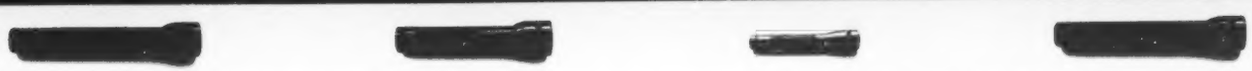

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Waxman's stance on the warranty, "The 8/80 forces the manufacturers to produce high-quality major emissions parts which are essential to the regulation of low-level emissions vehicles. In this regard, there is a very real environmental benefit. We also feel that we owe the consumers something. After all, we are rolling back the general parts warranty to 2/24, so we feel they deserve something in return."

Of course, the 8/80 warranty does not help the aftermarket, but Schiliro explained that Waxman is fighting in the interest of three groups (aftermarket, consumer, and environmentalist) and cannot afford to alienate any of them. In the overall picture, this concession does the least damage to the aftermarket.

Don Randall, president of ASA, believes that the 8/80 will eventually be included in Clean Air. "Waxman will consolidate his position with other congressmen when H.R.3030 comes to the House floor," he said. "Either he or one of his allies will introduce an 8/80 amendment, and it will likely be passed."

The Senate Bill also forces automakers to inform the motorist of the right to choose maintenance and parts service for their vehicle by spelling out the law in the first page of the owners' manual.

Other provisions clarify anti-tampering laws and strengthen inspection and maintenance requirements. A stronger inspection program would reduce the number of older cars on the road. Some 36% of cars in use are ten-years-old or older, and one Environmental Protection Agency (EPA) study found these cars account for 69% of the hydrocarbons and 75% of the carbon monoxide in the air.

Aftermarket To Gain

Schiliro said the automotive aftermarket is the only industry which stands to gain from the Clean Air revision. He sizes up the situation with a dose of cautious optimism, "This is the best shot they've ever had (at getting a favorable revision), but things could still change."

Randall echoes this attitude. He said, "The industry cannot rest yet. There is no guarantee these measures will still be in the final version of the bill. We have spent countless hours and dollars in lobbying, and we will continue to do so until the President signs this bill." ■

MARKET RESEARCH

There were 523,000 outlets that sold automotive products in the U.S. in 1989, according to the fourth edition of *The Retail Distribution of Automotive Products* study, published by the Automotive Parts & Accessories Association (APAA), Lanham, MD.

Accessories: How Big Is This Market?

By Edward L. Kaufman, Contributing Editor

Markets are how you define them. This is particularly true of the broad category of products that we in this business loosely define as "automotive accessories."

For example, using a narrow definition of "automotive accessories," the most recent Frost & Sullivan report on the total automotive aftermarket (published in spring 1989) came up with an estimate of nearly $5 billion in retail sales of accessories in 1988. The report predicts that that figure will rise past $6 billion by 1993.

Included in the Frost & Sullivan definition of accessories were: car sound, mobile air conditioners, cruise control, cellu-

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MARKET LINE

AUTOMOTIVE ACCESSORIES: A $7.6 BILLION MARKET

Here are our estimates of 1989 retail sales for five groups of accessories. We are indebted to Michael Burroughs, head of Burroughs & Associates, for his assistance in developing these estimates.

Type Of Accessory	Sales In $ Millions
Electrical/Electronic Items	4600
True Performance Items	500
Appearance Performance Items	1580
Appearance/Comfort/ Convenience Items	750
Fast Turn Impulse Items	200
TOTAL	**7630**

Our estimate of $200 million in sales for impulse items is conservative. Estimates of sales of appearance/comfort/convenience items range from $500 million to over $1 billion. Appearance performance items include custom wheels, a category of $400-to $600 million, and performance tires, a category with sales around $1 billion. True performance items include four types of products with sales exceeding $100 million: cam shafts, fuel systems, performance suspension, and performance suspension systems.

Source: Lindsey-Kaufman Co. & Burroughs & Associates

lar phones, electronic security devices, radar detectors, power accessories plus custom wheels and wheel accessories.

Five billion dollars is a lot of money and the accessories mentioned are important items, to be sure. But, it is indeed a very narrow definition. Not included in that definition are such important products as seat covers, floor mats, the whole range of accessories bought for light trucks (like bed liners, rails, running boards and pass-through windows); nor sun roofs, mirrors, wipers, sun shields, air fresheners and novelty accessories (like fuzzy dice).

An Endless List

The list of automotive accessory items appears to be endless. Which raises this question: how do stores monitor their accessory business when there are so many products to keep track of, let alone SKUs?

Practices vary and, significantly, they appear to be changing. A top executive of an East Coast chain said, "Formerly, we lumped all accessories together, the items for the performance and light truck markets together with car items like pin striping, graphics, mirrors, dual wipers in Euro colors and air fresheners.

"As accessories have become more important to us, we have restructured our business. Today we monitor five major categories of merchandise: hard parts; motor oil and chemicals; performance items, including chrome-plated parts as well as cams and headers; light truck items, including running boards; and accessories, the appearance items, seat covers, floor mats, change trays, litter baskets, car sound, radar detectors, air fresheners, graphics, etc."

In this case, the chain subdivided its accessories business by type of customer: performance, light truck, and other. Within these categories, this chain measures its progress in terms of shipments from its distribution centers (DCs) to its stores; and within stores it measures sales on a planogram basis: percent of total sales, total inventory, and investment.

Still, that leaves quite a lot of other items to monitor which vary greatly in size, price, turnover, and other characteristics. Some retailers group accessories according to apparent motivation of the consumer for buying the product. For ex-

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MARKET LINE

ample, appearance accessories, performance accessories, and comfort-and- convenience accessories. That's okay, but if you think about it, there can be multiple reasons for buying any one type of accessories. And in fact, the more you think about these varied motivations, the more effective you are likely to be in selling them.

With these points in mind, we offer for your use, and comments, a classification system in chart form which considers six sets of reasons your customers may have for buying an accessory. We also include a chart on our estimates of 1989 retail sales for five groups of accessories.

As you can see on our chart, one of the accessory categories, electrical/electronic items, accounts for the bulk of that $5 billion in sales discussion in Frost & Sullivan's 1989 report.

The category of true performance items include those parts which can actually affect the operating performance of a vehicle, make it go faster or handle turns better. These items are accessories only in the sense that they are not your standard replacement parts. To sell them, you have to be able to speak the language of performance enthusiasts. But if you can do that, you are also well prepared to reach the larger group of customers for "look fast" performance accessories, like custom wheels and high performance tires.

AUTOMOTIVE ACCESSORIES CLASSIFIED BY CONSUMER BUYING MOTIVATION

APPEARANCE/ PERFORMANCE ITEMS	APPEARANCE	CONVENIENCE	COMFORT/PLEASURE	PERFORMANCE HANDLING	SAFETY/SECURITY	IMPULSE NOVELTY
Wheel Covers	■	□	□	□	□	□
Custom Wheels	■	□	□	■	□	□
Performance Tires	■	□	□	■	■	□
Chrome Valve Covers	■	□	□	□	□	□

Although often viewed as mainly appearance items, high performance tires and wheels can have a very positive affect on road handling ability. And, since these can represent a sale of upwards of $2,000 per vehicle, they have a very positive affect on your cash flow as well.

We have grouped under the heading of appearance/comfort/convenience interior accessories, like floor mats, seat covers, and exterior accessories such as sun roofs, roof racks, rails, running boards and bed liners. This type of grouping can be argued, and we'd appreciate your comments on it. What works best for you?

We have listed a few examples—but only a few—of the many types of impulse and novelty accessories on the market. Some retailers call this the "Allison category" after the broad line of inexpensive accessories made by the Allison Corp., Livingston, NJ. However, that company is also a major manufacturer of seat covers, cushions, car covers, wheel covers, jacks and air compressors.

At Allison, Saul Dennison estimates total industry sales of fast turn impulse accessories at $150-to-$250 million annually. "This is an ever-changing, but ever growing market. Some retailers devote 12-to-20-feet of space to impulse accessories. Trends in the market? Colors! 'Euro colors' like red, black and white dual wiper blades. Also mean colors—hot blues and pinks—in interior accessories."

No matter how you take its measure, the automotive accessories category is big and while fuzzy dice may be funny, the profits derived from this category are dead serious. ■

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Allied Signal

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The Aftermarket's Just Desserts

Accessories are "feel good" products. Like rich deserts, consumers buy them simply because they want them, not because they need them.

by **John Wirebach,**
Senior News & Features Editor

Accessories are the high margin, high profit items in most retail stores. There's a lot of competition for the chemicals and commodity parts business, so margins in these categories are lower. And the more profitable hard parts sales often depend on customers' vehicles breaking down.

But unlike the chemicals that can help a vehicle's performance, or the hard parts that are absolutely essential to the well-being of the vehicle, many accessories are non-essential. People buy accessories because they want to buy them, not because they have to buy them.

That's one reason why accessories are so profitable; it's also the key factor in selling them. Selling accessories should be an easy job. What should be easier than selling something to someone who wants to buy it? Accessories are sold to suit the personal taste of consumers. Accessories make consumers feel good about their vehicles and themselves. Accessories are a fashion and lifestyle statement for vehicle owners.

Adding an accessory is one way consumers can personalize and customize their vehicle. While mass production cars and trucks look alike, accessories enable individuals to change vehicles to suit themselves. It allows the individual to say, "This is mine and no one else's."

On an elementary level, very few consumers want to be like the next guy. Although it's impossible to redesign all products for all people, consumers want the same product to be different. This means, "He has a sun shade and I want one too. But I want one that says something completely different."

Desire, Not Income, The Key

Some indication of how important individual desires are to sales can be seen clearly in the data from our latest *Consumer Automotive Repair Study (CARS)* in which we surveyed DIY consumer purchases of eight accessories.

You might expect that consumers with more income would buy more accessories. But that's not so, according to the *CARS* data. The percentage of households with annual incomes under $20,000 was 25%. Here's the ranked order of the accessories most frequently purchased by this group:

- Auxiliary Lights
- Window Film
- Wheels
- Seat Covers
- Car Sound
- Sun Shades
- Floor Mats
- Electronics

Except for high-ticket electronic accessories and floor mats, households with incomes of less than $20,000 bought accessories in proportion to their population. In some cases, they actually made up a larger proportion of buyers than their population.

At the other end of the scale, households with more than $40,000 annual income (28% of the survey) did not buy more accessories. The only category of accessories in which their percentage of purchases was significantly higher was electronics. Electronic accessories was this group's highest ranked purchase.

Ultimate Niche Markets

Because accessories are so personal, an item that's silly, unwanted, and worthless to one person is beautiful, prized, and almost priceless to another. For example, at the past few Specialty Equipment Market Association (SEMA) shows, we've seen more and more accessories in hot pinks, greens and blues, and other so-called neon colors, especially in light truck lines. As one manufacturer said of his line, "We expect to use those colors in the future. I shudder to think what it will look like. But that's what our light truck customers want."

We often speak about special and niche markets in *Automotive Marketing*. Well, accessories represent the ultimate niche market. Here again, our *CARS* data is useful. The survey suggests that for accessories sales, young people and females are important niche markets.

Consumers under 25-years-old made up 14% of the total survey population. However, in categories such as car sound, custom wheels, and auxiliary lights, this group made up about a quarter of all purchases, almost twice the percentage the population would indicate.

About 30% of the consumers on the *CARS* study were female. These consumers bought at significantly higher rates in such accessory categories as sun shades,

CAR SOUND

FLOOR MATS

SEAT COVERS

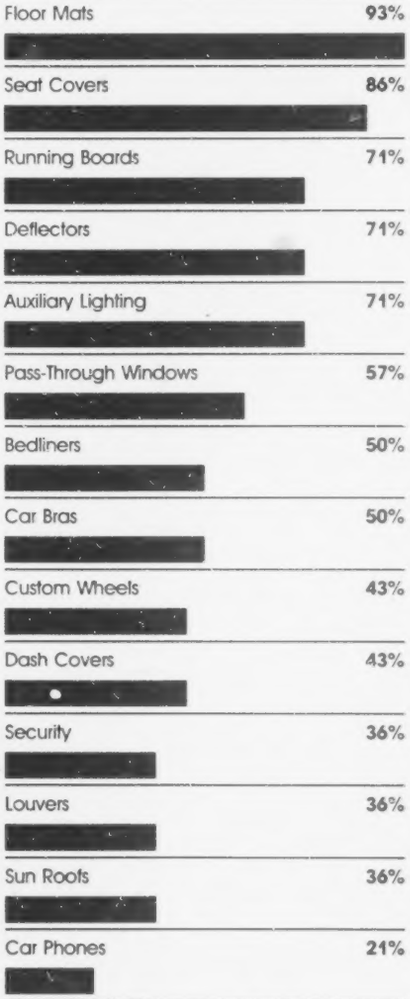
floor mats, and seat covers. Ronald Jones, director of marketing at Tires, Wheels, Etc., a 10-store California operation, said customer surveys found that 38% of their customers were women.

Accessories sales promotions and advertising give retailers a chance to get these two demographic groups into their stores. But, be aware that the two groups are important buyers in different categories.

Selling accessories today requires effort, commitment, and focus. The key is variety and choice. Consumers comparison shop for accessories more than any other product, according to *CARS*. For example, in the high-ticket electronics and car sound categories, over 70% of purchasers comparison shopped before buying. In seat covers and custom wheels, the percentage of comparison shoppers was 59% and 56% respectively. Even in low-ticket, impulse item sales like sun shades, 27% of the *CARS* DIYers shopped around before buying.

WHAT ACCESSORIES DO RETAILERS STOCK?

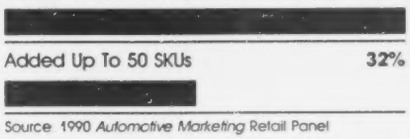
We questioned our Retail Panel about what lines of 15 popular accessories they presently stock.



Source: 1990 *Automotive Marketing* Retail Panel
Equals more than 100% due to multiple answers.

ACCESSORY SKUS ADDED

We asked for a ballpark estimate of how many accessory SKUs our Retailer Panel members had added since 1985.



Source: 1990 *Automotive Marketing* Retail Panel

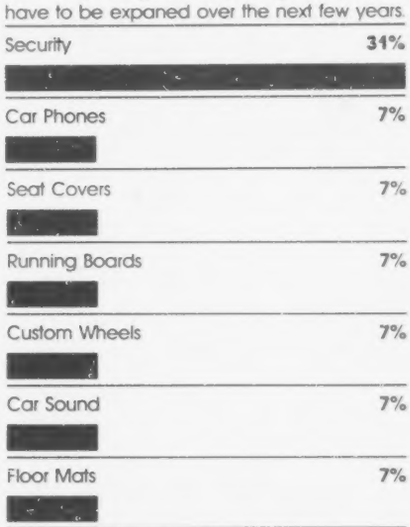
Rules For Success

You want to be certain your store is one that consumers are sure to consider when shopping for accessories. We can offer some suggestions for successful selling:

- Make an effort to provide the right selection of product, an investment in inventory to offer choices in SKUs.
- Make a commitment to display space, point-of-purchase materials, and proper sales help for the DIYer. Many accessories such as bedliners, custom wheels, louvers and the like require space to be seen. Customers can't buy what they can't see.
- Accessory sales are aided immensely if you can install the item for the customer. But even retailers without installation bays are successful. Denise Merry, regional sales manager for Dee Zee, Des Moines, IA, notes that 38% of running boards are sold and installed. While that means that 62% are sold DIY, it won't hurt to establish a close relationship with an installer.
- Focus on the potential customers for accessories in your area. Get close to your customers, get to know what accessories they want, and what accessories they might buy.

EXPANDING ACCESSORY CATEGORIES

We asked our Retailer Panel Members which accessory categories they thought they would have to be expaned over the next few years.



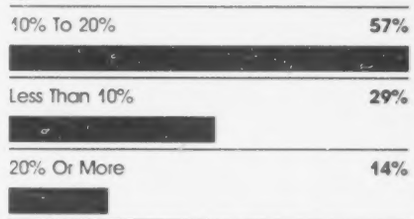
Source: 1990 *Automotive Marketing* Retail Panel
Equals more than 100% due to multiple answers.

Keeping Up With Fads

In addition to these suggestions, stay alert to what's happening in accessories. Dennis McDonald, co-owner of Arcata Auto, Arcata, CA, said, "You absolutely need to be a trend setter to be successful. Customers come to expect to see new items first. One way is to hire salesman involved in aspects of automotive work."

ACCESSORIES & UNIT SALES

We asked our Retail Panel members what percent of their unit sales accessories accounted for.



Source: 1990 *Automotive Marketing* Retail Panel

For the last few years, it's seemed that everyone was snapping up signs that said "Baby On Board" or furry cats that stick to the side windows. These impulse items were sold as fast as retailers could stock them. Now, those fads have faded, but there will be more fads in the accessory business. There are few limits to the items consumers will buy to put on their vehicles if the product is appealing, useful, or just plain fun, and if the price is right.

One good piece of advice came from Klaus Hubrich, sales manager for Rancho Suspension, Long Beach, CA, talking about the hot colors so popular among young light truck owners. "You can't go by what you want or like. It has to be what the customer wants. Some 80% of the accessories sold at the SEMA Show are less than two-years-old."

The cardboard sun shade is an example of an accessory that's become a wild success. Whereas they're not high-ticket items, sun shades are a strong sellers in many color, design, and logo variations. We found that 23% of the DIYers in our 1990 *CARS* purchased a sun shade last year, making it the number one accessory

(of nine) on the survey. Alert retailers got in on the category early, and profited.

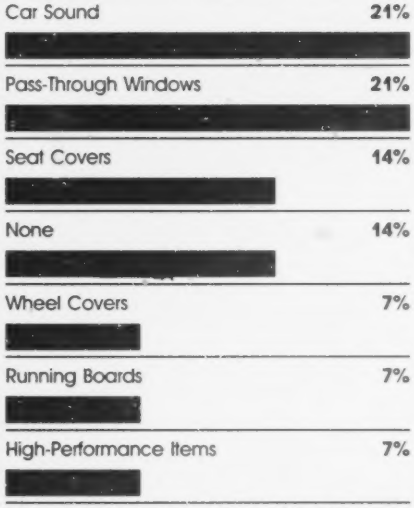
A Case Study

In fact, low-priced sun shades are only the tip of a particularly interesting category that's sprung up recently. We call it the solar protection category since it began in the Sunbelt. In addition to sun shades that protect the interior while the car is parked, there's growing use of window film to block out the sun's rays all the time. And, there are dashboard covers, rear deck covers, visor extenders, and steering wheel covers—all accessories designed to protect the interior surfaces of a vehicle.

We asked several suppliers of dashboard covers why people buy them. "When the industry started in the Sunbelt—Arizona, California, Texas, New Mexico—they were bought for protection from the sun," Nari Grupta, vice president of sales at Dash King, Anaheim, CA, said. "And to cover up old faded and cracked dashboards. But more and more, it's to personalize and to give the dash a nice upholstered look."

CUTTING ACCESSORY CATEGORIES

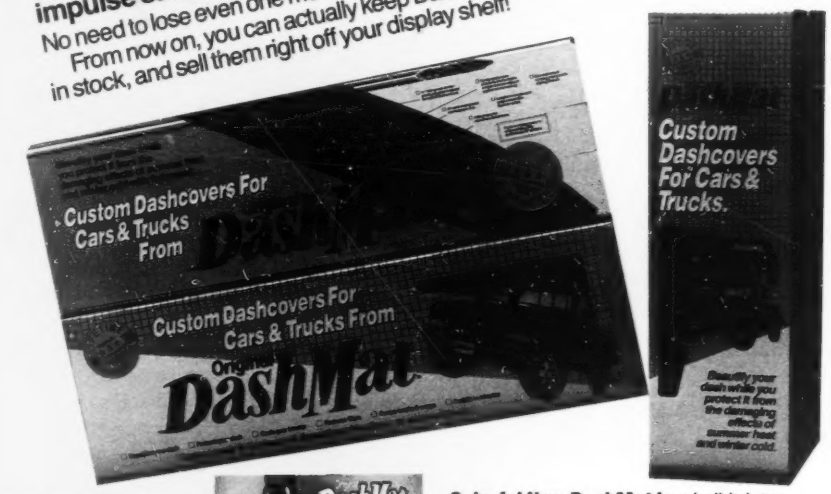
We asked our Retail Panel members which accessory categories they thought they could safely cut back on over the next few years.



Source: 1990 *Automotive Marketing* Retail Panel
Equals more than 100% due to multiple answers

According to Ralph Moher, marketing manager for Dash Designs, Phoenix, the category has continually improved. "The first ones were pretty basic. They were just a couple of pieces of carpet sewn together. But that kind of thing doesn't fly anymore. More and more, new car buyers use them to personalize their car. It's something that looks nice. Consumers demand a fit like a glove. Now, we use car-

Original DashMat®
Does it again!
Now! Carry the hot ones in stock for extra profit!
New...from DashMat, the nation's #1 dashboard cover... dynamic NEW packaging means more in-store sales...more impulse sales...more quick profits for you!
No need to lose even one more sale because your customer won't wait for delivery. From now on, you can actually keep DashMat's most popular models and colors in stock, and sell them right off your display shelf!


Custom Dashcovers For Cars & Trucks From
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Three-panel rotating display shows and sells DashMat, VelourMat and ValueMat! Features sample swatches of each product. Comes fully assembled... 18" x 18" x 18"...designed to fit comfortably on your display shelves. It's eye-catching, traffic-stopping, and as always, self-selling!

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When DashMat first exploded on the scene in 1979, we wrote the book on dashboard product display. Now DashMat rewrites the book by raising display standards—and sales—to new heights! Choose any or all of these three stunning new sales aids...

Two-panel flat counter card features the original DashMat and luxurious VelourMat side by side, complete with colorful sample swatches. 18" high x 28" wide, it works on counter or shelf, with side panels for self-support. Or, hang it on the wall with pegs.

Single panel flat counter card sets off the power of ValueMat sales! Self-supported by side panels... 16" high x 20" wide...it's a sales booster on shelf or counter! Complete with attention-grabbing mini-dash and display swatch.

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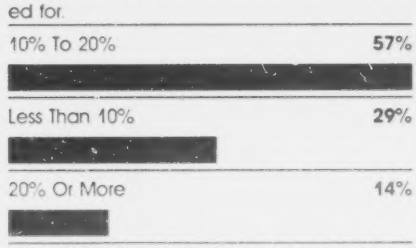
(Circle 17 on Product Information Card)

ACCESSORIES & DOLLAR SALES

We asked our Retail Panel members what percent of their dollar sales accessories accounted for.



Source: 1990 *Automotive Marketing* Retail Panel

peting and velour. The velour is a little more upscale look; the carpet is more rugged and durable."

The category is pretty simple for retailers. There's no inventory, no space in the warehouse, displays are free and phone calls are on an 800 line. "The best thing is, it takes no money to get involved," Brad Poston, president of DashMat, Phoenix, said. Since the covers are custom molded to fit particular models (suppliers claim applications total about 15-16,000), retailers usually only provide a display and sample along with instructions. They simply phone in a special order that's shipped in 24-48 hours.

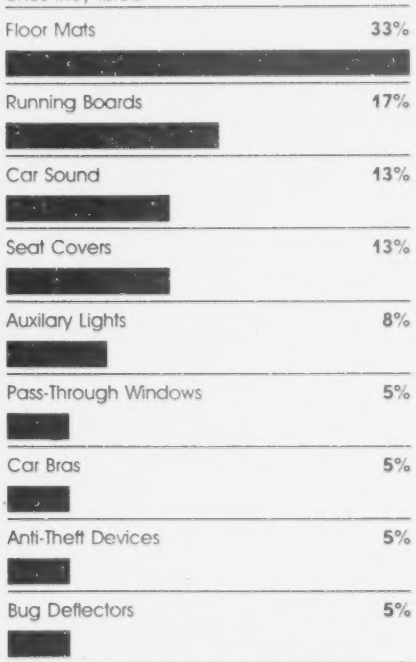
Still, while selling dashboard covers simple, suppliers agree that the *interested* retailer does better. Moher said, "A lot of sales are impulse sales. People don't particularly go in looking for a dashboard cover. A little suggestive selling helps a lot. Our display will get attention and if a consumer is remotely interested will get them asking questions. And clerks can make a sale. You need somebody interested to sell any accessory"

Poston noted that the top numbers were for Chevy and Ford full-size pickups. However, he added, "People are buying nicer cars now. And more of our sales are going to new cars. People are car-conscious; it's more expensive and they want to keep it longer and keep it in good shape."

Suppliers expect the market to be well over 750,000 units and in the $30-35 million range at retail this year.

THE MOST PROFITABLE ACCESSORIES

We asked our Retail Panel members to list the three most profitable accessories. Here are the ones they listed.



Source: 1990 *Automotive Marketing* Retail Panel
Equals more than 100% due to multiple answers

Fast Growth Rate

The growth of new categories such as dashboard covers is one reason why accessory sales have grown at a slightly faster rate than the general aftermarket recently. Lindsey-Kaufman Co., an aftermarket consulting firm in Tenefly, NJ, projected 1989 accessory sales at $9.5 billion, representing about 8.8% of a total $108 billion aftermarket. This is a step up from Lindsey-Kaufman's calculations in 1984, when accessory sales measured $6.6 billion or 7.5% of total sales.

According to president and *Automotive Marketing* Contributing Editor Edward L. Kaufman, car sound and automotive electronics make up the single largest category of accessory sales at some $4.6 billion. Performance sales are just behind at $1.58 billion. He predicts an overall growth rate in accessory sales of about 4.8%.

While these numbers reflect the entire aftermarket, the percentage of sales accounted for by accessories is about a quarter of all retail store sales, according to Lindsey-Kaufman.

Reasons For Growth

The growth in accessory sales has been fueled by three factors. First is the surging sales in performance products whether it be accessories that make a car go faster or just make the car look like it goes faster. The 1990 Specialty Equipment Market Association (SEMA) Market Study reports that engine parts, manifolds, carburetors and chrome dress-up items are four of the top five fastest growing specialty products sold retail.

However, performance tires and custom wheels are still the major items in performance dollar sales. As Matt Trebuchon, a store manager for Super Shops, one of the largest performance retailers, said, "People buy wheels and tires first when they get a new truck, or car. And that can be a $2,000 sale. It's just like a tennis shoe, price is secondary. They'll buy the most expensive wheel, just to make a statement."

The fifth item on the SEMA study's top five was light truck accessories of all kinds. And so, the second factor has been the explosion in light truck sales. About one in three vehicles sold today is a light truck of some kind. In fact, the best selling vehicle for the last seven years has been a Ford pick-up.

Is it any wonder retailers are adding special light truck accessory sections? Surveying our retail panel, we found that 71% stocked running boards, wind deflectors, and auxiliary lighting; 57% carried pass-through windows, and 50% stocked bedliners. Elsewhere in this issue we've devoted a special article to our most recent study of the light truck market.

The third factor is continual innovations by suppliers. Each year brings its new accessory. In recent years, Eurocolor wiper blades, antennas, and license plate holders have been in vogue. In fact, color coordinated accessories have become a key for retailers. We've already pointed out the strength of dash covers and window screens. The latest craze seems to be neon colored accessories of every shape and size. "Neons are hot in clothing, dresses and beachwear," one supplier said. "Now, we're seeing it spill over into bumpers, wheel covers, wipers or whatever. It's just another fashion statement."

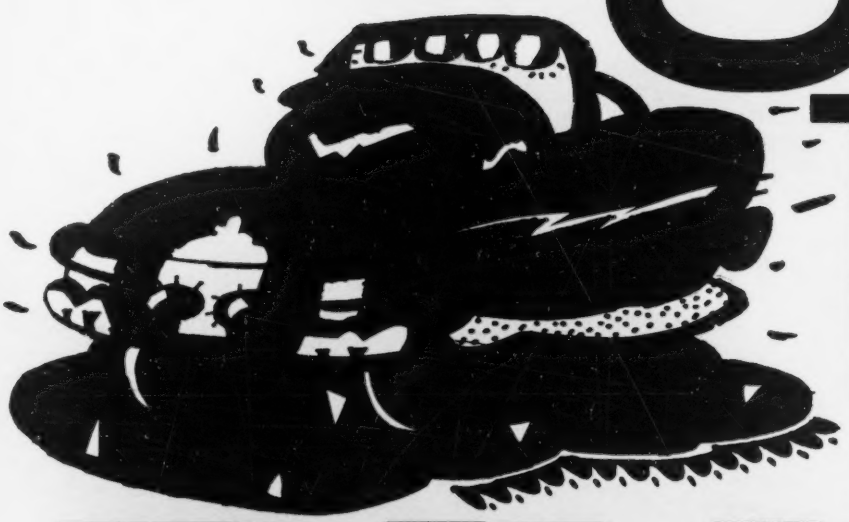
So there you have it. Accessories are high profit, good sellers, but selling them requires some effort on your part. Go to it. ■

CHECKLIST FOR NEW ACCESSORIES

Here are some of the things to consider when examining a new line of accessories.

1. Number of SKUs
2. Price points
3. Promotions: frequency and timing
4. Advertising/Co-op support
5. Packaging/Instructions/POP
6. Staff training needed to sell
7. Amount of space needed for proper display
8. Type of display (gondola, pallet, floor, wall, dump, etc.)
9. Seasonal or year round item
10. Related item sales
11. Projections for current and future season
12. General forces that will influence sales
13. External forces that might influence sales (OE technologies, etc.)
14. Rational for adding or deleting SKUs

The Light Truck DIYer:



Male baby-boomers like their light trucks, vans, and utility vehicles.
And, they buy lots of products to personalize them.

by **P. Royall Katcher,**
Business Editor

A Breed Apart

Light truck, van, or utility vehicle owners are potentially among your best customers.

But, it's not always easy to know who makes up this important niche market or how to reach them. In response, *Automotive Marketing* has produced a nationally projectable study of light truck, van, and utility vehicle DIYers. And, what we learned may be just the thing you'll need to reach this market.

Generally, we found, light truck, van, and utility vehicle owners who do some sort of DIY work on their favorite vehicles are male baby-boomers who are fairly well heeled (over $30,000 in annual household income).

They like their trucks.

More than half of them who have more than one vehicle in the household use their truck as their primary vehicle. Another 6% uses a utility vehicle as the primary vehicle, while 7% depend on a van as the primary vehicle. Only 34% of those who can choose between a car and some other type of vehicle, think of their car as their primary vehicle.

And now, to specifics:

The Light Truck DIYer

Males tend to be light truck DIYers more than females. And, during the past year, a good 14% more males who are light truck DIYers bought some automotive products for their vehicle than did female light truck DIYers. In all, 10% more males than females bought one automotive product; 3% more bought two products; and 1% more even bought six products.

The big age group of light truck DIYers is from 25- to 44-years-old. In all, 57% of light truck DIYers fall into this category. Reflecting the national demographic trends, a slightly higher percentage of female light truck DIYers than male DIYers are in this age group.

In terms of either end of the age spectrum, less than 1% of light truck DIYers are under 18-years-old, while only 7% are over 65-years-old. Another 10% are aged between 18- and 24-years-old, the same percentage as light truck DIYers who are 55- 64-years-old.

Light truck DIYers tend to be well educated. A quarter of all light truck DIYers attended at least some college, while only a slightly smaller percentage graduated from a college or university. Interestingly, almost half the light truck DIYers who are high school graduates, but did not attend college, are in the 45-55-years-old bracket.

More male light truck DIYers, 71%, are married than female light truck DIYers, 61%. However, 7% more female light truck DIYers are widowed than male DIYers, 2%. And, 6% more female DIYers have never been married than male DIYers.

Almost a quarter of all light truck DIYers hold jobs that fall into the category of "craftsmen and kindred workers." Among males, it's almost 30% who hold those types of jobs. Another quarter of all light truck DIYers hold white collar jobs described as professional/technical/managers/administrators.

In all, 10% more women light truck DIYers fall into the household income category of $10,000 to $20,000 per year than male DIYers. But, 15% more female DIYers also fall into the over $50,000 per year household income category than do male DIYers. Most male light truck DIYers fall into the $20,000-$40,000 total household income category.

Finally, a quarter of those light truck DIYers who spend 11 hours a month on automotive DIY—serious DIYers—also enjoy a household annual income of over $50,000. Clearly, this well-heeled group is made up of people who look on their light truck, van, or utility vehicle as a hobby. They are prime candidates for sales of special light truck-type products.

Where They're From

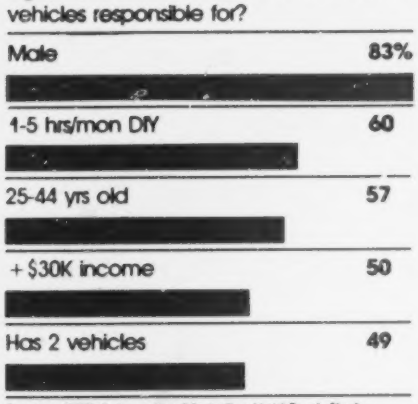
Light truck DIYers are found across the country, but some areas have more of them than others when compared to the car-owning population. We've divided the U.S. into natural marketing areas—based on such factors as geography, popular culture, weather, and history—and projected what percentages of light truck DIYers live in these areas.

- Old South, the Confederacy of 1861-65: 31%
- Grainbelt Central, the traditional Mid-

western plains states from Texas to Minnesota: 12%
- Spanish West, the areas of Arizona, New Mexico, Texas, and California heavily influenced by Hispanic culture: 11%
- Smokestack Central, the industralized Midwestern states such as Illinois, Indiana, and Ohio, 10%
- Greenbelt West, the Pacific Coast of northern California, Washington, and Oregon: 9%
- Smokestack East, the industralized mid-Atlantic states such as New York, New Jersey, and Pennsylvania: 9%
- Desert West, the empty area in the West that includes large parts of such states as Utah, Montana, and the Dakotas: 7%
- Greenbelt East, New England: 5%
- Megalopolis North, the urban belt from Washington, DC, to north of New York City: 5%
- Caribbean South, the tip of Florida: 1%

PROFILE OF THE "AVERAGE" LIGHT TRUCK DIYER

What are the characteristics of the "average" light truck, van, or utility vehicle DIYer in terms of gender, hours a month spent on automotive DIY work, age, household income, and number of vehicles responsible for?



Source: 1990 *Automotive Marketing* Light Truck Study

AUXILIARY LIGHTS

Auxiliary lights were the second most purchased product for light trucks, vans, or utility vehicles, according to the DIYers with whom we spoke.

In all, 40% of them bought their auxiliary lights at auto stores, while a third went to discount stores to buy the product.

When asked why they bought where they did, most, 61%, mentioned price, while 30% looked for a convenient location. Another 20% looked for a wide range of auxiliary lights from which to choose. Only 3% bought the lowest quality possible.

Just over half shopped around for the best price. But, slightly more than half the DIYers who bought auxiliary lights bought the lights they thought were the best quality available.

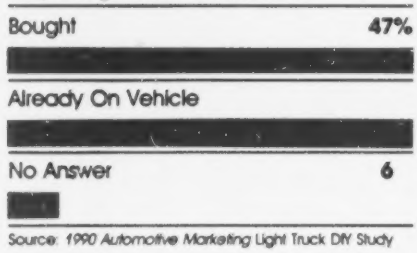
Auxiliary lights are clearly a DIY-type of product. Some 87% of all DIYers who bought these products also installed them themselves.

Of them, 42% did so to save money. However, a quarter of all DIYers who installed their own auxiliary lights did so because they enjoyed the job.

And, 93% said they'd be "very" or "somewhat" likely to install their own auxiliary lights again. ■

AUXILIARY LIGHTS: DEALER INSTALLED OR AFTERMARKET

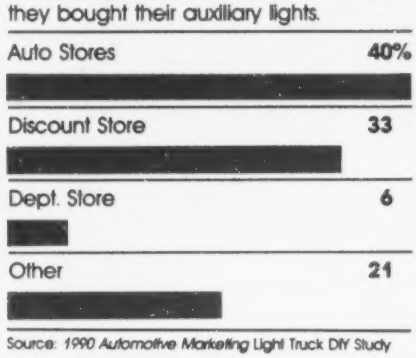
We asked the DIYers who owned light trucks, vans, or utility vehicles if their auxiliary lights came with the vehicle or they bought them afterwards.



Source: 1990 *Automotive Marketing* Light Truck DIY Study

WHERE DIYERS BOUGHT AUXILIARY LIGHTS

We asked the DIYers who owned light trucks, vans, or utility vehicles and bought auxiliary lights for their vehicles where they bought their auxiliary lights.



Source: 1990 *Automotive Marketing* Light Truck DIY Study

ANTI-THEFT DEVICES

Anti-theft devices appear as the eighth-highest purchased item among DIYers who own light trucks, vans, or utility vehicles.

Stores specializing in electronics, such as stereo stores, were the most popular places to buy security devices. But automotive stores were the second most mentioned type of place where DIYers buy anti-theft devices. When asked why they bought where they did, half mentioned the low price they paid. Almost a quarter looked for product selection, while 21% said it was a habit to buy where they did. Even so, only half shopped around for price before buying their anti-theft devices.

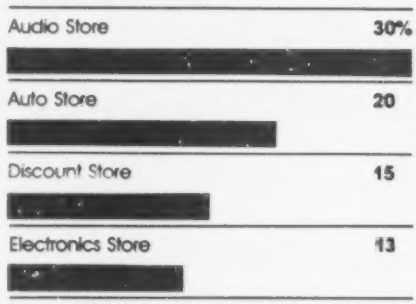
Most, 87%, bought what they consider to be "top of the line" anti-theft devices in terms of quality.

In all, 44%, of the DIYers who bought anti-theft devices installed them themselves. About half of those who did said they did it to save money. Another 38% said they did it because the job was easy, simple to do. And, 14% said they enjoyed doing it.

Therefore, it should come as no surprise that all the security device installers with whom we spoke, said they'd be either "very" or "somewhat" likely to install their own anti-theft devices themselves again. ■

WHERE DIYERS BOUGHT ANTI-THEFT DEVICES

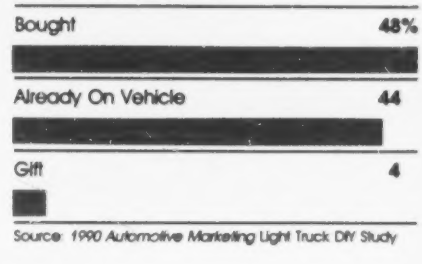
We asked the DIYers who owned light trucks, vans, or utility vehicles and bought anti-theft devices for their vehicles where they bought their anti-theft devices.



Source: 1990 *Automotive Marketing* Light Truck DIY Study

ANTI-THEFT DEVICES: DEALER INSTALLED OR AFTERMARKET

We asked the DIYers who owned light trucks, vans, or utility vehicles if their anti-theft devices came with the vehicle or they bought them afterwards.



Source: 1990 *Automotive Marketing* Light Truck DIY Study

Clearly, anyone doing business in Georgia, Alabama, Mississippi, East Texas, or the Carolinas ought to be seriously in the light truck, van, and utility vehicle parts and accessories trade. But, it's interesting that even 5% of light truck DIYers live in the heavily urbanized Megalopolis North area. Trucks just aren't for those old country roads anymore.

What Light Truck DIYers Do

A significant 40% of all light truck, van, or utility vehicle owners consider themselves "dedicated" DIYers—down-and-dirty DIYers who aren't afraid of replacing a radiator or transmission themselves. Another 38% said they're "medium" DIYers who don't shy away from oil changes or headlight replacements. Either type can install most light truck-type products, so they're good, potential customers.

On top of that confidence, light truck DIYers enjoy working on their favorite vehicles. In all, 41% said they like the work "somewhat," while a significant 26% said they like it "a lot."

Just over a third of them said they've increased the amount of automotive DIY work they've done over the past five years. Another 42% said the amount of this type of work has stayed the same over that period.

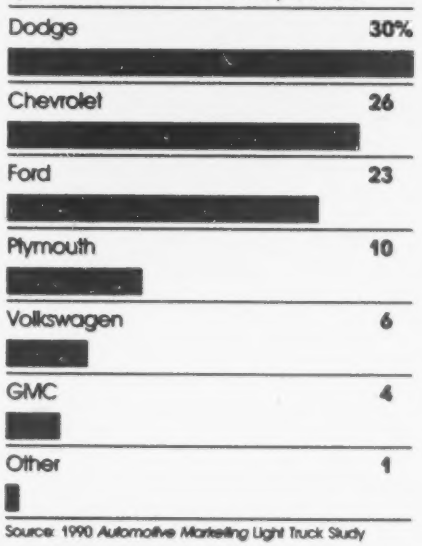
And, a quarter of them expect to do even more automotive DIY work in the future, while 60% think they'll be doing at least as much in the future as they do now.

This may explain why almost a third of all light truck DIYers said they know how to do all the automotive DIY jobs they want to know about. However, 13% of all of them said they'd like to learn how to do a tune-up. Also, 10% would like to be able to do body work on their light trucks, vans, or utility vehicles. Over half of them want to learn how to do this job from a friend or relative rather than from a professional service, such as a video or clinic.

They buy automotive products in automotive parts stores—at least 92% of them do. As well, 74% buy automotive products in discount stores; 40% in department stores; 39% in gas stations; 38% in

WHAT BRANDS OF VANS ARE OWNED

We asked the DIYers who owned light trucks, vans, or utility vehicles what specific brands of vans they owned.



Source: 1990 *Automotive Marketing* Light Truck Study

PASS-THROUGH WINDOWS

More DIYers who own light trucks, vans, or utility vehicles purchased pass-through windows than any other product we asked about.

They were fairly evenly divided in purchasing them in automotive specialty stores and general automotive retail parts stores. However, a significant 18% bought their pass-through windows at specialty RV/truck outlets.

Slightly more than half the DIYers who bought pass-through windows acquired them where they did because the price was best there. In fact, just over half shopped around to find the best price before buying where they did.

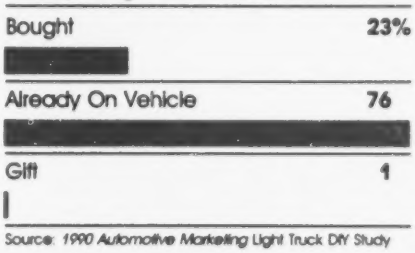
However, 28% bought where they did because the store's location was convenient. Another quarter looked for a broad product selection in the outlet they patronized.

Two thirds of all DIYers who bought pass-through windows had them installed by someone else. Most of them trusted specialty shops to do the installation work.

Among those DIYers who did install their own windows, they said they did the job because they wanted to save money, to make sure the job was done correctly, for personal enjoyment, or because the job was simple in fairly equal percentages. ■

PASS-THROUGH WINDOWS: DEALER INSTALED OR AFTERMARKET

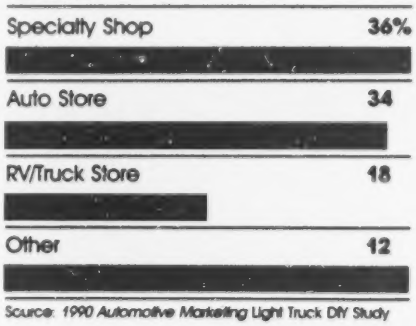
We asked the DIYers who owned light trucks, vans, or utility vehicles if their pass-through windows came with the vehicle or they bought them afterwards.



Source: *1990 Automotive Marketing* Light Truck DIY Study

WHERE DIYERS BOUGHT PASS-THROUGH WINDOWS

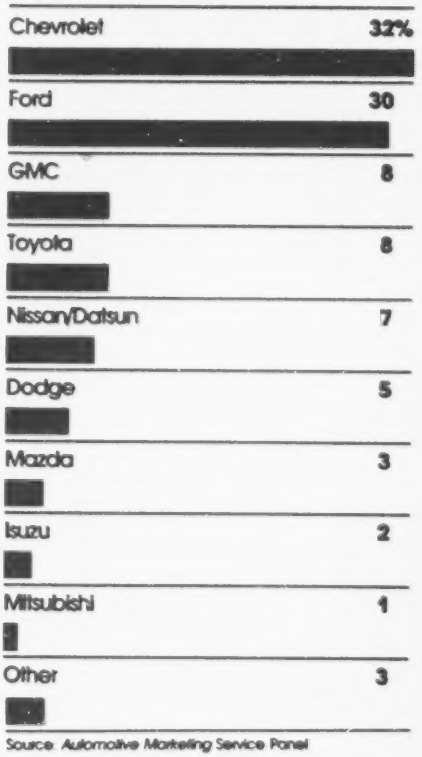
We asked the DIYers who owned light trucks, vans, or utility vehicles and bought pass-through windows for their vehicles where they bought their pass-through windows.



Source: *1990 Automotive Marketing* Light Truck DIY Study

WHAT BRANDS OF LIGHT TRUCKS ARE OWNED

We asked the DIYers who owned light trucks, vans, or utility vehicles what specific brands of light trucks they owned.

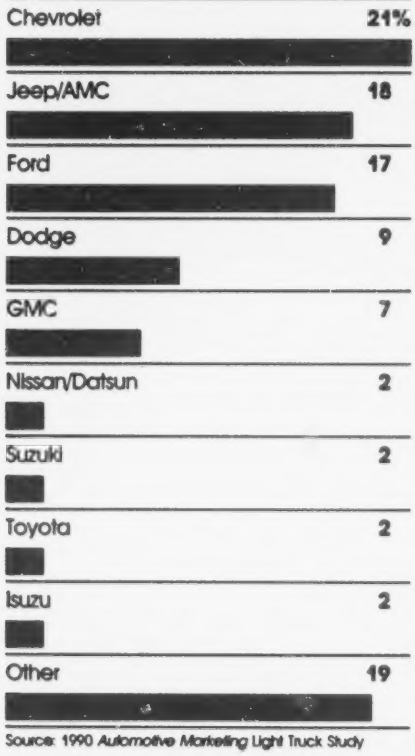


Source: *Automotive Marketing* Service Panel

car dealerships; 33% in automotive specialty repair shops; and 24% in hardware stores. So, there's lots of competition for those light truck DIYer dollars from non-automotive aftermarket retail outlets.

WHAT BRANDS OF UTILITY VEHICLES ARE OWNED

We asked the DIYers who owned light trucks, vans, or utility vehicles what specific brands of utility vehicles they owned.



Source: 1990 *Automotive Marketing* Light Truck Study

What They Bought First

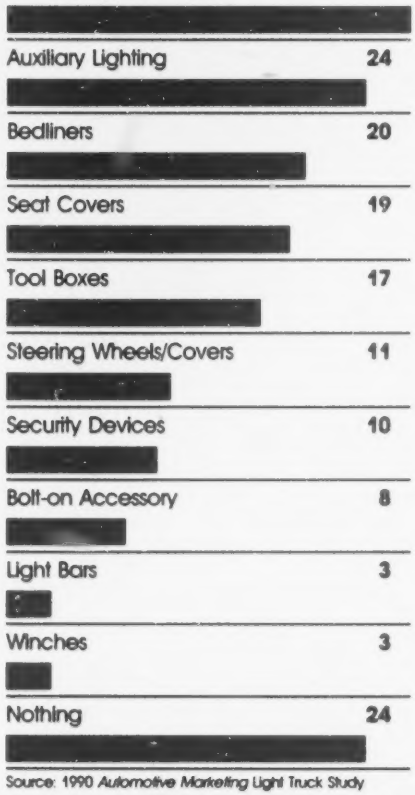
Most light truck owners begin personalizing their new vehicles right away. About two thirds said they bought some sort of new product right after buying their new vehicle. And, slightly more than a quarter of light truck DIYers who spend 11 or more hours a month on automotive DIY bought one automotive product during the past year.

We asked the DIYers who did buy something what the first product was that they bought after they got their new vehicle. Here's what they told us, in order of number of mentions:

- Bedliners
- Running Boards
- Exterior Accessories
- Cap/Camper Top
- Seat Covers
- Auxiliary Lights
- Tool Boxes
- Wheels
- Floor Mats
- Pass-Through Windows
- Stereo
- Steering Wheels/Covers
- Shocks
- Anti-theft Devices
- Winches
- Light Bars

WHAT PRODUCTS DIYERS BOUGHT FOR THEIR LIGHT TRUCKS

We asked the DIYers who owned light trucks, vans, or utility vehicles what specific light truck-type products they bought for their vehicles.



Source: 1990 *Automotive Marketing* Light Truck Study

What They'll Buy Next

On top of that, a third of all light truck DIYers plan to keep on buying. We asked them what products they thought they'd buy next. Here's what they told us, in the order they said:

- Exterior Accessories
- Bedliners
- Running Boards
- Seat Covers
- Auxiliary Lights
- Wheels

BEDLINERS

Bedliners appear as the fourth-highest purchased item among DIYers who own light trucks, vans, or utility vehicles.

Discount stores and automotive stores are almost tied for first place for where DIYers buy bedliners. When asked why they bought where they did, 67% cited the low price they paid. Just over a quarter looked for product selection, while 22% went to a nearby store. Even so, 67% shopped around for price before buying their bedliners.

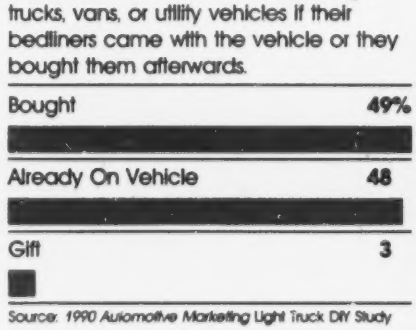
And, just over half, 56%, bought what they consider to be "middle of the line" bedliners in terms of quality.

Most, 87%, of the DIYers who bought bedliners installed them themselves. While in most cases the majority of DIYers install any given product to save money, just less than half of those who did it themselves gave that as the reason. Almost half, 42%, said they did it because the job was easy, simple to do.

Therefore, it should come as no surprise that most, 89%, said they'd be either "very" or "somewhat" likely to install their own bedliners themselves again. ■

BEDLINERS: DEALER INSTALLED OR AFTERMARKET

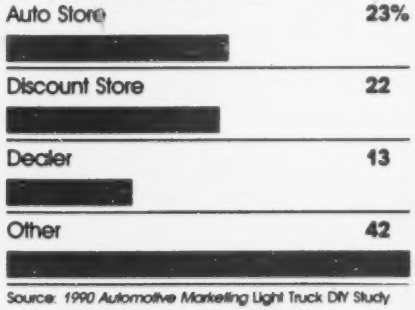
We asked the DIYers who owned light trucks, vans, or utility vehicles if their bedliners came with the vehicle or they bought them afterwards.



Source: *1990 Automotive Marketing* Light Truck DIY Study

WHERE DIYERS BOUGHT BEDLINERS

We asked the DIYers who owned light trucks, vans, or utility vehicles and bought bedliners for their vehicles where they bought their bedliners.



Source: *1990 Automotive Marketing* Light Truck DIY Study

RUNNING BOARDS

Among DIYers owning light trucks, vans, or utility vehicles, running boards were the third most often purchased items.

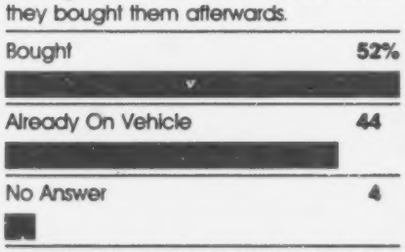
Most DIYers, 52%, who bought running boards bought them at auto parts or RV/light truck parts stores. When asked why they bought where they did, over half, 54%, said that the low price attracted them to that particular source. However, 34% looked for the selection offered while another 24% simply went to a store that was conveniently located.

Despite the large number who shopped where convenient, almost three quarters of all running board purchasers actually shopped around, looking for the price available, before buying running boards.

Even though the people with whom we spoke were DIYers, over half, 54%, did not install their own running boards. In all, 24% had the job done at a specialty shop, while another 11% went to the auto parts store for the installation. And 8% had a friend or relative do the job. Only 6% each went to an independent garage or back to the vehicle's dealer. ■

RUNNING BOARDS: DEALER INSTALLED OR AFTERMARKET

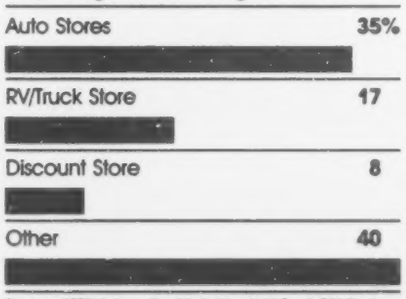
We asked the DIYers who owned light trucks, vans, or utility vehicles if their running boards came with the vehicle or they bought them afterwards.



Source: *1990 Automotive Marketing Light Truck DIY Study*

WHERE DIYERS BOUGHT RUNNING BOARDS

We asked the DIYers who owned light trucks, vans, or utility vehicles and bought running boards for their vehicles where they bought their running boards.



Source: *1990 Automotive Marketing Light Truck DIY Study*

- Tool Boxes
- Cap/Camper Top
- Stereo
- Pass-through Window
- Anti-theft Device
- Winches
- Shocks
- Light Bar
- Steering Wheel/Cover

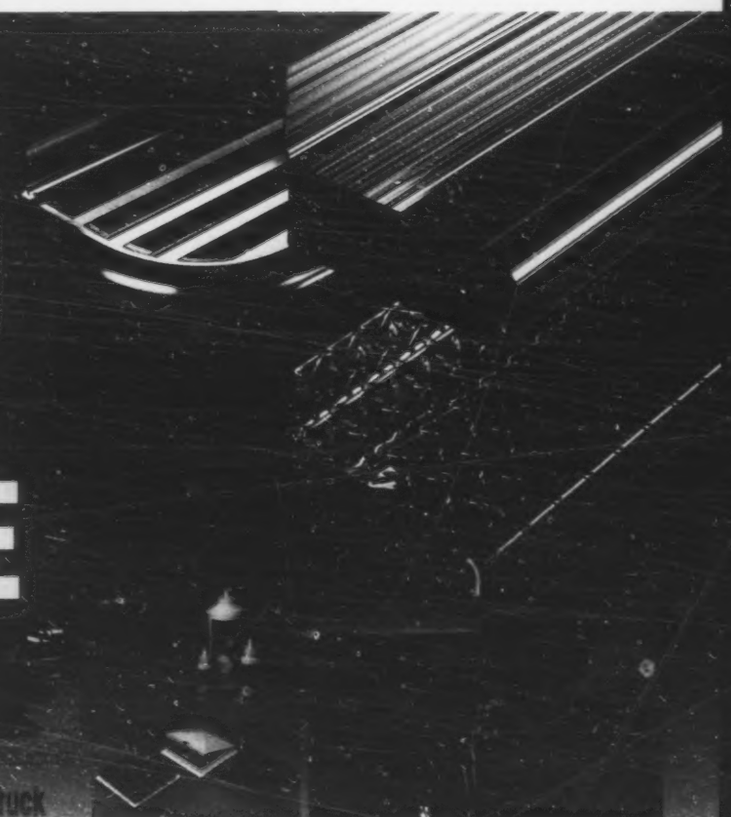
So, prepare for good light truck product sales to real enthusiasts. ■

STUDY METHODOLOGY

To prepare the 1990 *Automotive Marketing Light Truck DIY Study*, we again turned to the professional services of Chilton Research Co. (CRS), Radnor, PA. CRS interviewed, by phone, 306 owners of one or more of these vehicle types who also did some sort of DIY work on them. The job could have been as little as waxing or polishing the vehicle—waxers and polishers also buy lots of aftermarket products—or as involved as replacing a transmission or changing a CV-joint and front spring. CRS's questions were designed to determine the buying and installing patterns of specific light truck-type products of these DIYers.

In all, 80% of the respondents owned a light truck; 24%, a van; 14%, a utility vehicle; and 92%, a car in addition to one of the first three types of vehicles.

HERE'S THE RUN DOWN ON *YOUR* PROFIT LINE



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